

FUNDRAISING WORKSHOP MEETING WITH  
BARBARA BROWN, VICE PRESIDENT  
COMMUNITY FOUNDATION FOR SOUTHERN ARIZONA

July 9, 2014

Meeting opened at 2:30 PM

Board Members attending: Lora Zeinun, Elvia Rodriguez, Cecilia Kory, Marcelino Varona, Esther Morales, Arnoldo Montiel, Cesar Parada, John Doyle, Linda Rushton

Barbara Brown gave us her background in fundraising and made suggestions to change our fundraising letter which were incorporated in a new letter to be sent out and personally handed out by Board Members.

She reviewed the By-Laws and felt they are <sup>carried</sup> ~~canned~~ but may work for us. She said they cover everything we need. We may want to personalize the by-laws to our particular organization with term limits.

When asking for funds, we should be able to tell each donor that 100% of the Board financially supports the organization. It doesn't matter how much each Board Member gives, the fact that they financially support the organization is what counts. Each Board Member should have a job and job descriptions need to be listed.

Term limits, i.e. three 3 year terms and then off a year may be one way to handle term limits, but since this Board all started at one time, it may be best to stagger terms from 1 to 3 years for Board Members. Board Members that have ended their term should be "asked" back by the Board as opposed to assuming they will return. Future Board Members should possibly be asked to serve on a committee before being nominated for the Board to see how effective they are. Creating an Advisory Board of 5 or 6 people is a good way to network in the Community and some of them should be people who are able to make large donations. Generally the Advisory Board will meet only once a year.

Barbara Brown suggested several ways to help SCCA members. March is "Write a Will" month and she will help us find an attorney and a CPA to speak about writing wills and including non-profit organizations in the will. Usually this is a 2 hour class. Suggested attorney is Tim Alcott in Green Valley and the workbook needs to be translated in to Spanish before a class can be held in Nogales.

Grant writing was discussed and she suggested we do a 2 page proposal, "Dear Foundation" letter describing the number of people we serve, (these should be unduplicated people), male/female, definition of senior (age), services we provide, outcomes (purpose), survey (why to people come), favorite things to do while attending and how people get to the center. We should list partnerships and Barbara said some suggested partnerships were: Head Start, Humane Society and schools.

She suggested we have a website. We need to gather photo releases from everyone attendee at the Center so photos can be put on website. We should look at other websites. We should provide an opportunity to give on the website

Barbara suggested the following ways to gather information that would help provide information for grant applications and suggested Foundations from which to get grant funding:

1. Each Board member should sign a "Conflict of interest" form.
2. Confidentially Agreement
3. Track Volunteer Hours – There is an Independent Section by State Government to track the value of volunteer hours.

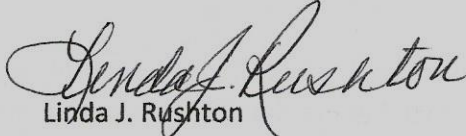
Foundations to contact:

1. White Elephant – Special time and process for making application for funding

Barbara will do:

1. Guidelines for White Elephant donations
2. Write a Will – get bi-lingual attorney and CPA in area if possible
3. Find someone to translate the workbook
4. Send us guidelines for grants
5. Send us Conflict of Interest and Confidentially forms

Meeting was concluded at approximately 4:30 PM

  
Linda J. Rushton  
Substitute Secretary